User Manual

Edocx Version 1.12
Build 2.3.5302.31902
Windows 7

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Getting Started

Thank you for downloading and using Edocx. We are delighted that you have chosen to join a growing community of users who recognise that Edocx is the way of the future in data management.

Edocx differs from other cloud storage companies in that storage is only part of the bundle, the whole of which is designed to act as a completely customisable tool for sharing and tracking documents according to your individual needs.

The purpose of off-site storage is to provide a layer of redundancy that contributes to a disaster recovery solution. On-site storage is effective only if you can access your data undamaged. If your premises are destroyed by a disaster, or your backup device is stolen, it is highly likely that you will either have corrupt data or no backup data at all.

Off-site storage also allows access via an Internet connection. Mobility is very rapidly becoming an important part of business plans, with the ability to access files on the fly anywhere via laptops, tablets and mobile devices being crucial.

No matter where you store your data, if it has value to you, you must have a well thought out plan to protect it properly and to be able to access it in the event of a disaster. Utilising the cloud can be a part of that plan, but understanding the terms of service is of utmost importance. If you are uncomfortable with cloud storage, find alternative methods to achieve the desired results. You may trade time for convenience, but your peace of mind is highly relevant to the development of a comprehensive backup and disaster recovery solution.

Edocx is a quantum leap forward in combining cloud computing with seamless ease-of-access on the fly, whilst giving you peace of mind that your files are well organised, and most importantly, securely stored in Australia.

The essence of Edocx lies in its simplicity. All you need is an active internet connection to get started. Once installed on your computer, simply open Edocx and you are ready to start uploading, storing and sharing files.

Lost your files? Computer isn't working for your presentation? iPad has run out of battery? No problem; simply connect any computer or smartphone to the internet and you can access all files uploaded to Edocx. If you cannot install Edocx on your device, you can run the web page version of Edocx, Edocx Web, and still have access to all your files.

Never worry about confusing yourself with multiple file copies. With Edocx, any file that is being edited by another user is clearly labelled and locked for editing. Multiple users can view a document, and re-upload it to Edocx. There will be a list of versions in the file's history, with details of who last edited it, when it was edited, and the current version number.

If you are concerned about running out of space, we have increased data storage bolt-ons which are available on demand. Currently, we are offering space upgrades that range from 5GB to 100GB which can be added to your original subscription's allocation.

Edocx has been created as a minimal fuss solution for file sharing and collaboration, so there is no need to download or install updates. Every time you log in, Edocx will fetch and implement any updates required, so you will always be using the most current version. If Edocx ever does need a manual update, we will provide easy instructions on how to implement the update.

For more information on the most up to date pricing, details and future implementation plans, go to edocx.com.au.

Installing Edocx

Windows

If you have not already downloaded Edocx, you can do so here:

- Edocx for Windows: http://edocx.com.au/

After downloading the installer, double-click on the installer to open it.

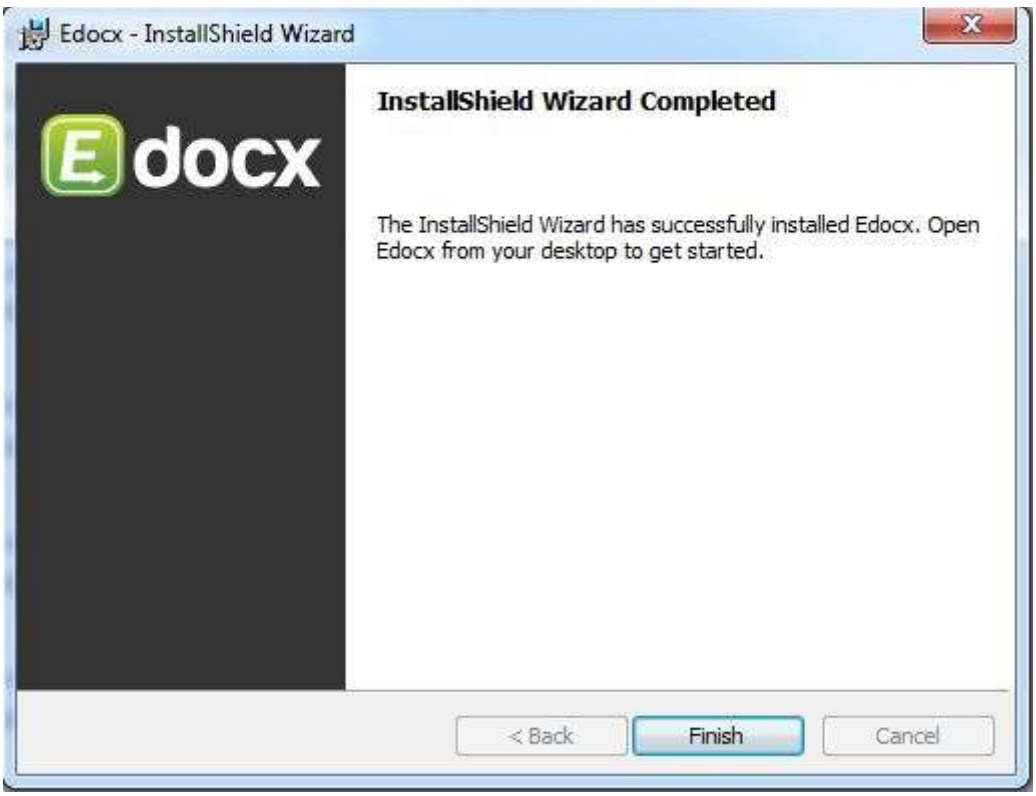
When the installer is run, a similar security warning should appear to the one below. Click **Run** or **Allow** to continue the installation.

Open File - Security Warning
Do you want to run this file?
Name: C:\Users\David\Downloads\edocx_setup.exe
Publisher: Barweb Pty Ltd
Type: Application
From: C:\Users\David\Downloads\edocx_setup.exe
Run
Cancel
Always ask before opening this file
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

A new installation window similar to the one below the Security Warning should open, after the installer extracts necessary software.

Edocx - InstallShield Wizard
Welcome to the InstallShield Wizard for Edocx
The InstallShield(R) Wizard will install Edocx on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

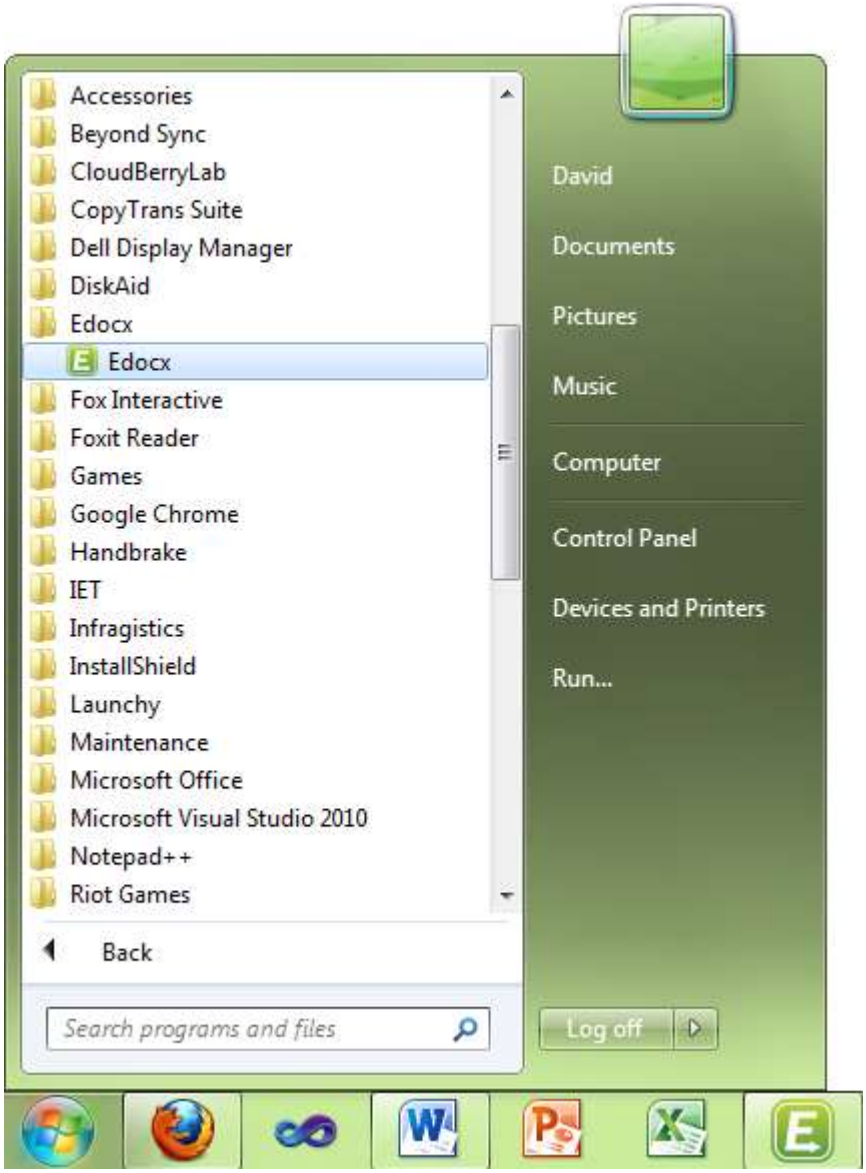
The installer will install Edocx here: “C:\Users\{{Current Username}}\AppData\Roaming\Edocx”
Click Finish to open Edocx and start sharing files.


Edocx - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Edocx. Open Edocx from your desktop to get started.
< Back
Finish
Cancel

Windows (cont.)

You have now successfully installed Edocx. You can access it from your desktop, or the Start Menu.

Location in the **Start Menu (Windows 7)**



Desktop Shortcut

Run Edocx without installing

If you are not able to install Edocx, and need to upload or transfer files across, download and click **Run** or **Open** and start using Edocx straight away.

- Edocx: https://edocx.com.au

This way, if you are on a locked down machine, or without administrator privileges, you will not have to install any files and can run Edocx straight away.

Logging in

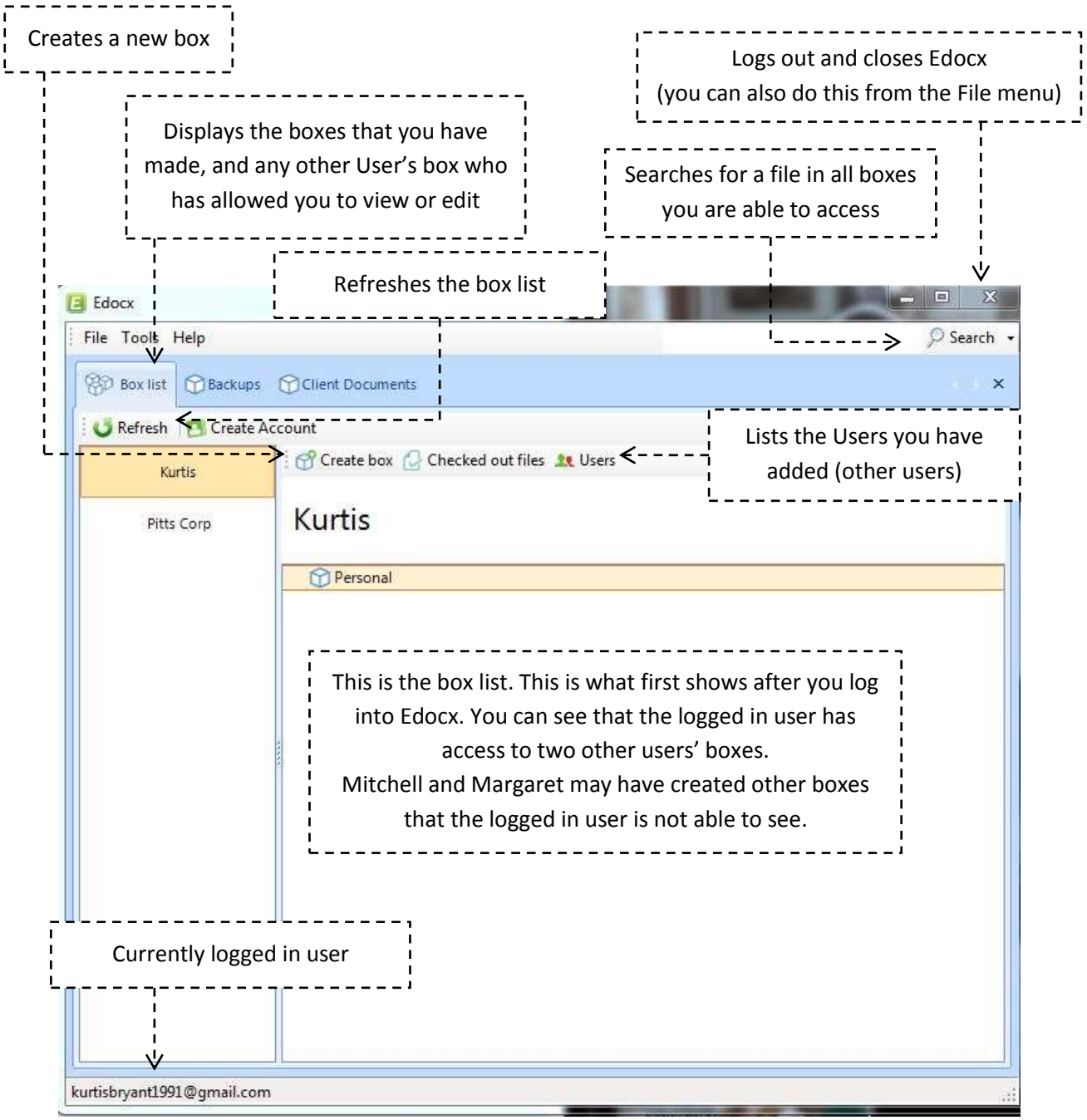
After opening Edocx, you will be greeted with a similar login box as below. Simply type in your email address and password to access your Edocx account. If you have forgotten your password, please look under **Password Recovery**.

You may experience a delay from the first time you open Edocx to go to the Box list. This is because Edocx is meant to be a dynamic, easy-to-install program that requires minimal space, so it automatically fetches updates for the most current version – you will need an internet connection to use and update Edocx. The second time you login on the same computer, Edocx will load faster.

Boxes

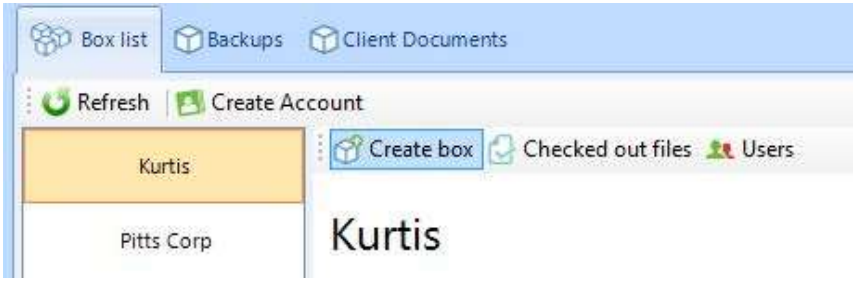
Boxes are where files are stored on Edocx. You can make an infinite number of **Boxes**, and can specify which **Users** can see which **Box**. If you would like to understand more about **Users**, please look under **Users and Security**.

After logging into Edocx, the first page that it opens to is your current list of **Boxes**, known as the **Box list**. If you are starting a new Edocx account, your **Box list** will be blank. To start, click the **Create Box** button to make a new box. If you have other users – called **Users**, who have allowed you access to their **Boxes**, they will appear here. For more information on **Users**, read **Users and Security**.
Below is an example of a **Box list**.


Creates a new box
Logs out and closes Edocx
(you can also do this from the File menu)
Displays the boxes that you have made, and any other User's box who has allowed you to view or edit
Searches for a file in all boxes you are able to access
Refreshes the box list
Edocx
File Tools Help
Search
Box list
Backups
Client Documents
Refresh
Create Account
Create box
Checked out files
Users
Lists the Users you have added (other users)
Kurtis
Pitts Corp
Kurtis
Personal
This is the box list. This is what first shows after you log into Edocx. You can see that the logged in user has access to two other users' boxes.
Mitchell and Margaret may have created other boxes that the logged in user is not able to see.
Currently logged in user
kurtisbryant1991@gmail.com

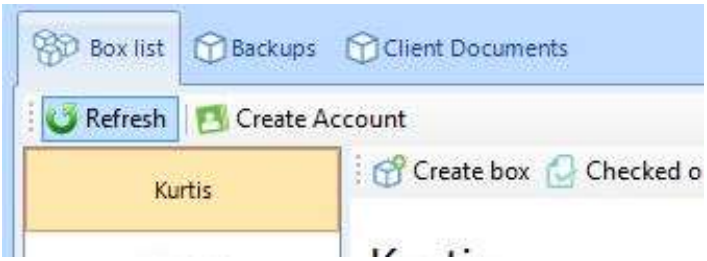
Adding a Box

To add a **Box**, locate the **Create Box** button up the top left of Edocx. After clicking on it, a new **Box** will be created under your name.



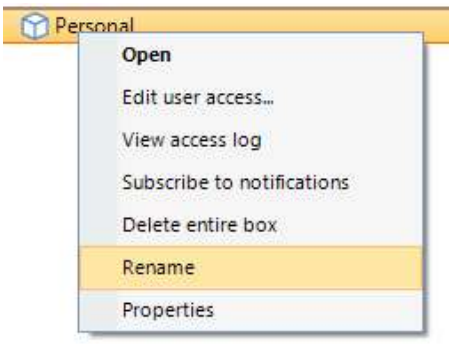
Refresh the Box list

To refresh the **Box list**, click the **Refresh** button next to the **Create box** button. If a User has added you onto a box and the box has not shown up, click **Refresh** to repopulate the **Box list**. You can also do this by right-clicking in the **Box list** tab and selecting **Refresh** from the dropdown menu.



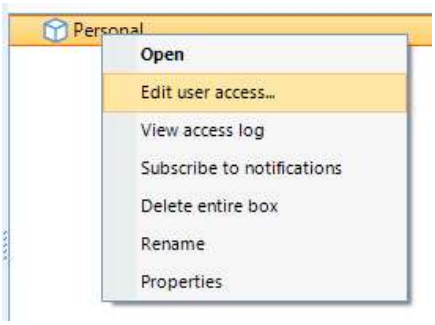
Renaming a Box

To rename a **Box**, simply right-click on an existing **Box** and select **Rename**.



Editing access to a Box

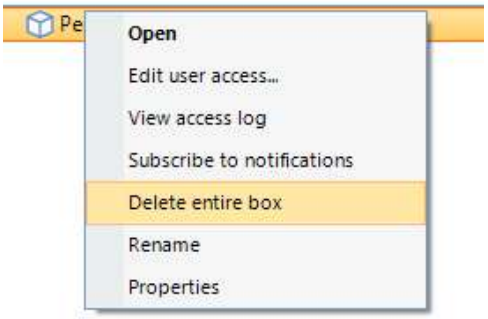
By default, you are the only user able to view and edit documents and files in your **Box**. To edit access to a box, right-click the **Box** and select **Edit user access** to view who has access to the **Box**.



You are not able to set permissions for specific files. If you would like a different set of permissions for a file or group of files, you will need to put them in a new **Box**. Note that the user also has to have a Edocx account to access the **Box**. For more information, look under the **Users and Security**.

Deleting a Box

To delete a **Box**, right-click on the **Box** that you want to delete, and select **Delete entire box**. Only delete a **Box** if you are sure it is empty.



Once a Box is deleted, the Box and any files within the Box are purged irreversibly – there is no way to restore them. You should only delete a **Box** if you are sure you have removed all files. You will receive a reminder prompt warning that the process is irreversible. Click **OK** to proceed with deleting the **Box**.

Example Box Layout

A box contains files and folders, but is also associated with a list of users (**Users**). When you are setting up your boxes, you should bear in mind that each box is assigned to a set of users.

Below are examples of how you could organise your **Boxes** and **Folders** for you to get an idea. A **Folder** is the same as a **Folder** on your computer, with the ability to store and organise files in.

John vs. Smith Case (Box)

- Evidence (Folder)
- Affidavits (Folder)
    - Plaintiff (Sub-folder)
    - Defendant (Sub-folder)
- Accessible to instructing solicitors and barrister

Paul's Dictations (Box)

- Dictations In (Folder)
- Dictations Out (Folder)
- Accessible to Paul and his P.A.

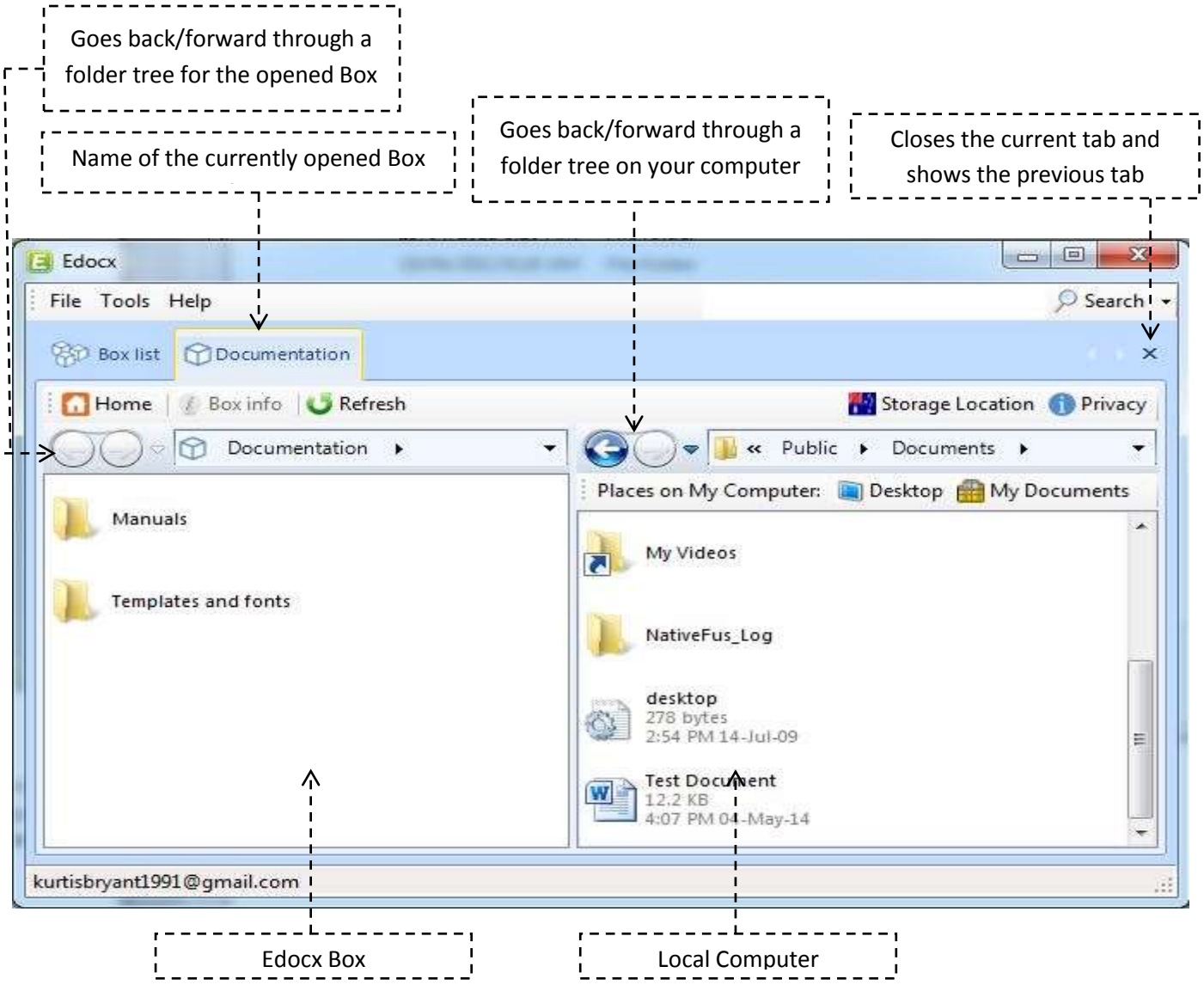
Financial Statements (Box)

- Quarterly reports (Folder)
- Cashflows (Folder)
- Accessible to Board members and accountant

Files

Edocx Box and Local Computer Sides

Once you have decided on what **Files** to put into a Box, create or open the specific Box to see a similar window as below.



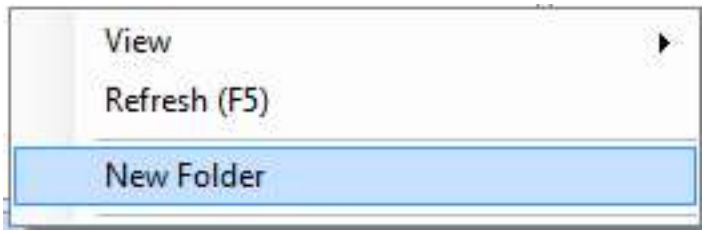
On the left-hand side, is the Box you are currently in. When you first create a new Box, Edocx will open the new Box. The Box (the left-hand side) will be empty, and ready for you to store files in it. Anything you would like to upload and access through Edocx, or let your **Users** have access to, you will need to upload to the Edocx side.

The right-hand side is your **Local Computer**, or **Local side**. By **Local Computer** we mean any files you can access from your computer, whether they be stored locally on your computer or on a networked drive.

If you would like to change where the **Local side** automatically opens to, look under **Changing the Default Start-up Directory**.

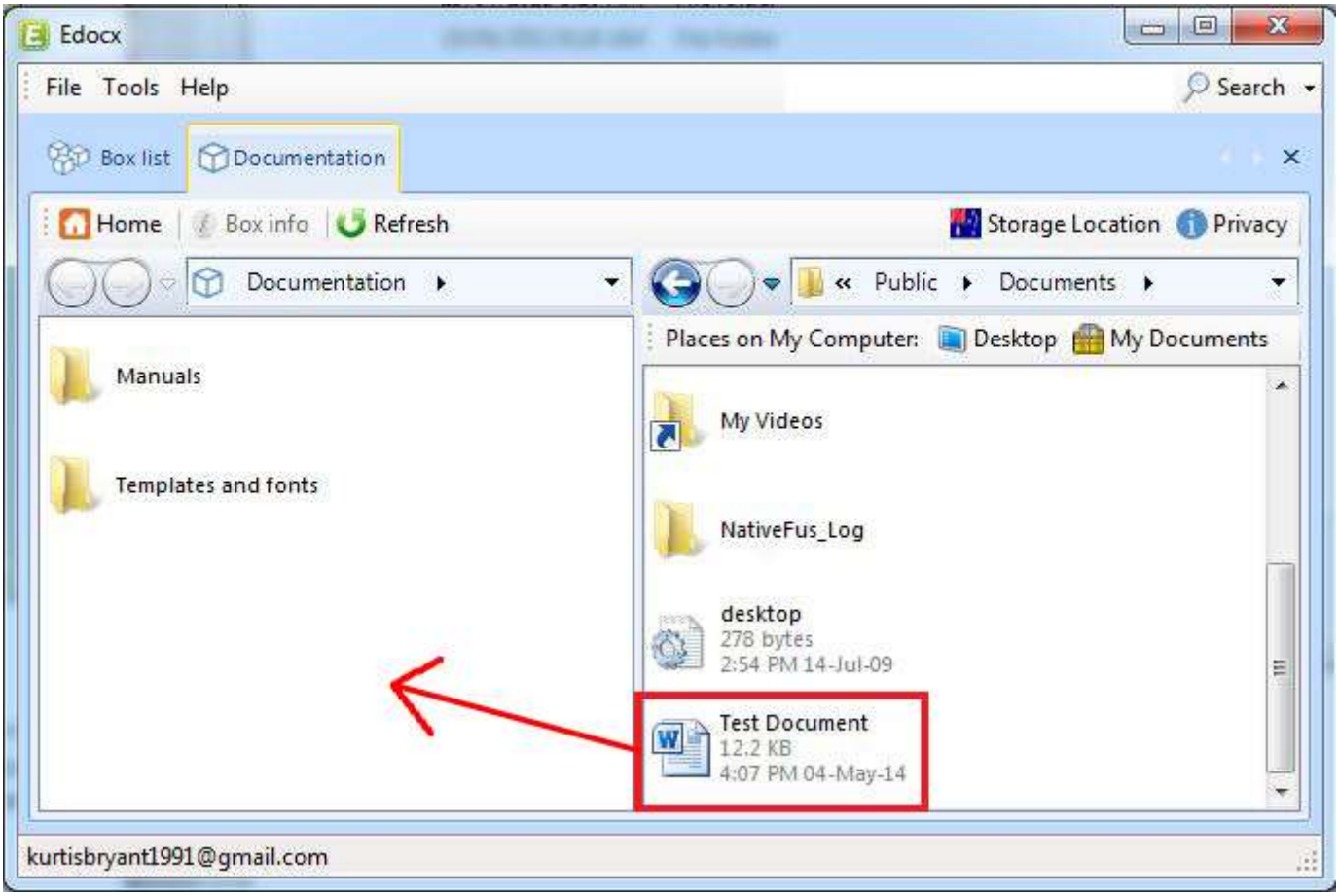
Add/create a new Folder in a Box

To add a **Folder** in a Box, right-click on the whitespace in any Box and select **New Folder**. Folders can have files and subfolders in them.



Adding a File to a Box

To add a file to a Box, locate it on the **Local side** – the right-hand side. Navigate to the location where you would like to put the file in Edocx, on the **Edocx side**, and drag the file or files from the **Local side** – right, to the **Edocx side** – left.



Changing Permissions on a File

Edocx does not currently support permission changes on singular files. However, you are able to change the permissions for a specific box. Remember that **Boxes** are assigned to a set of **Users**. If you would like to change the permissions on a single file, consider moving it into a separate box. To change which **Users** can access which Box, read **Editing Access to a Box**.

File Editing

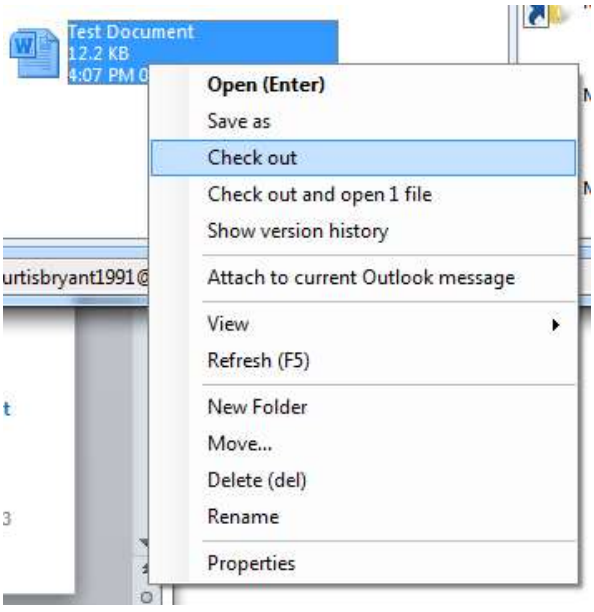
When you are in a Box, you will notice that Edocx has two panes. The left-hand side is the current Box that you are viewing, or the **Edocx side**, while the right-hand window is the **Local side**.

If you open uploaded files on the **Edocx side**, you will only open a read-only copy. To edit your files on Edocx, we have incorporated a system where you can **Check out** a file, edit it, and **Check in** your changes to update the uploaded version on Edocx.

Files can be highlighted to show who is working on each file. This highlighting is shown in the Edocx application, for both the local and remote sides. Mousing over any checked out file will give you more information, for instance, the date and time it was checked out. Check the **File Highlighting** section for more details.

Checking Files Out

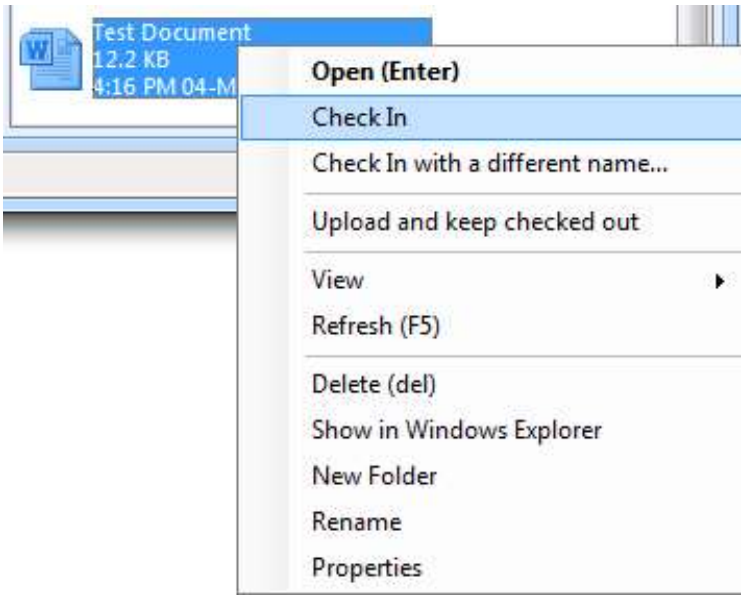
Checking a file out allows you to edit it without actually removing it from the box. Edocx will make a copy onto your computer that you can edit and **Check in** after editing. To **Check out** a file, right-click on a file in a Box, and select **Check out**. This will copy the file onto the directory currently viewed on the **Local side**. This file is now saved to your computer, and is an editable copy of the version on Edocx.



Checking Files In

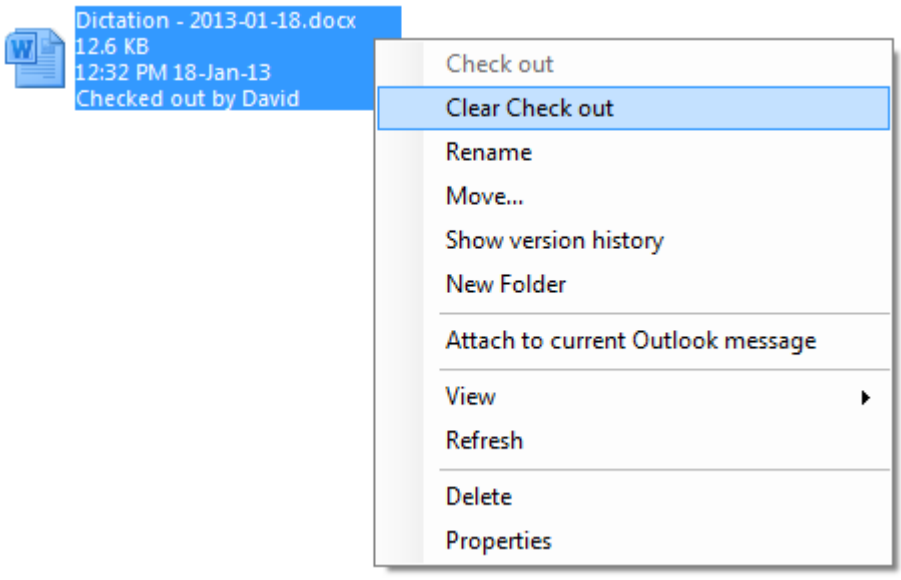
After you have finished editing your file, and you would like to save it back on Edocx, you have three options on the **Local side** for **Checking In** a file:

- **Check In**
  - This action updates the file on Edocx with the saved version on your computer
- **Check In with a different name**
  - When you Check In a file with a different name, you will be prompted to enter a name before the file is checked in. Once selected, the file will be checked in under the new name
- **Upload and keep checked out**
  - This function of Check In lets you keep working on your document, but updates the copy in Edocx with the saved changes on your computer.



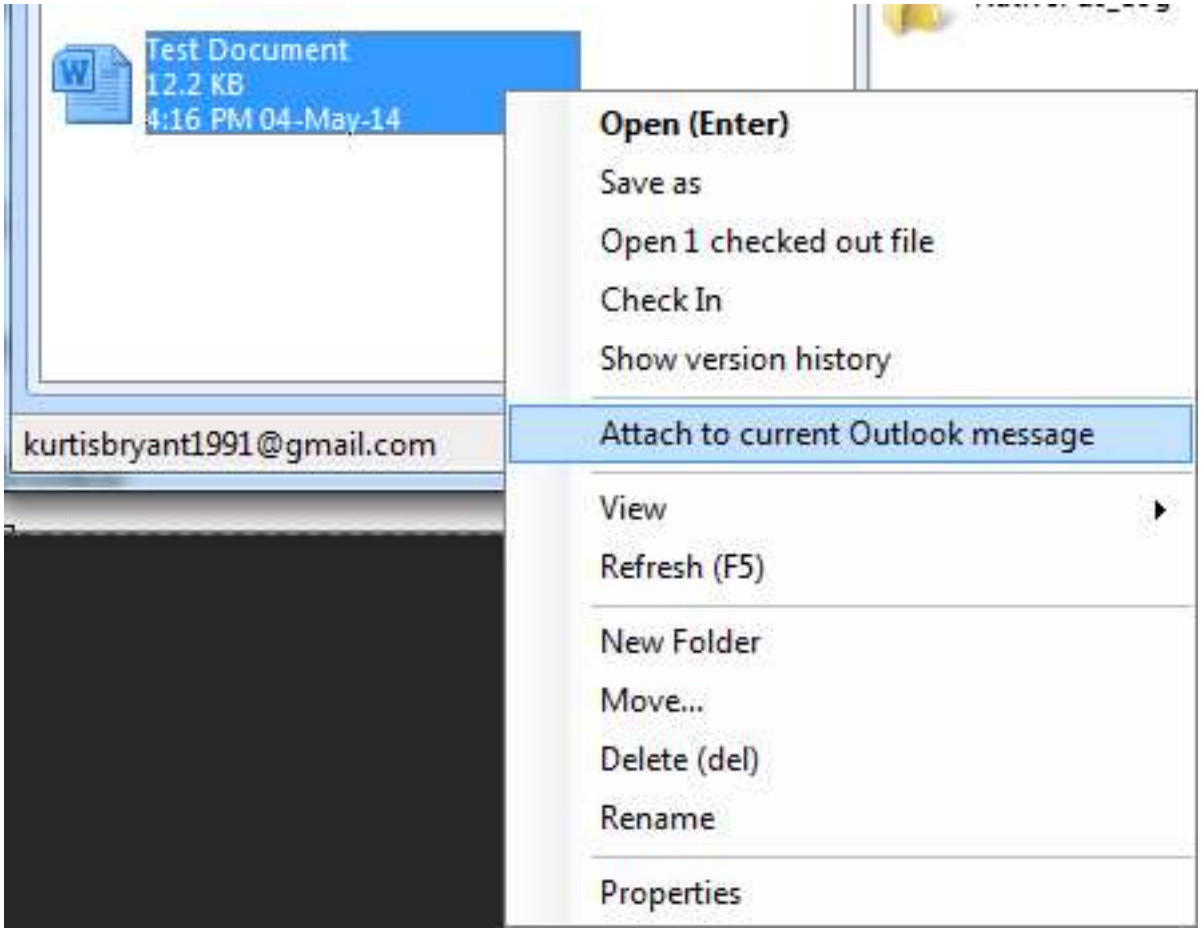
Clearing a Check Out

The **Clear Check out** option removes the read-only lock on a file that is checked out. You will be prompted before you clear a check-out. This will remove the highlighting from the file and let others be able to edit the file.



Attach to current Outlook message

If you need to send an email with a file from Edocx, this feature saves you time by attaching the selected document to an Outlook message. Instead of downloading the file, opening the file location and attaching it to an Outlook email, simply create a **New message** in Outlook, and then click **Attach to current Outlook message**. Make sure you have Outlook open, and have created a **New message**, otherwise Edocx cannot attach the message.

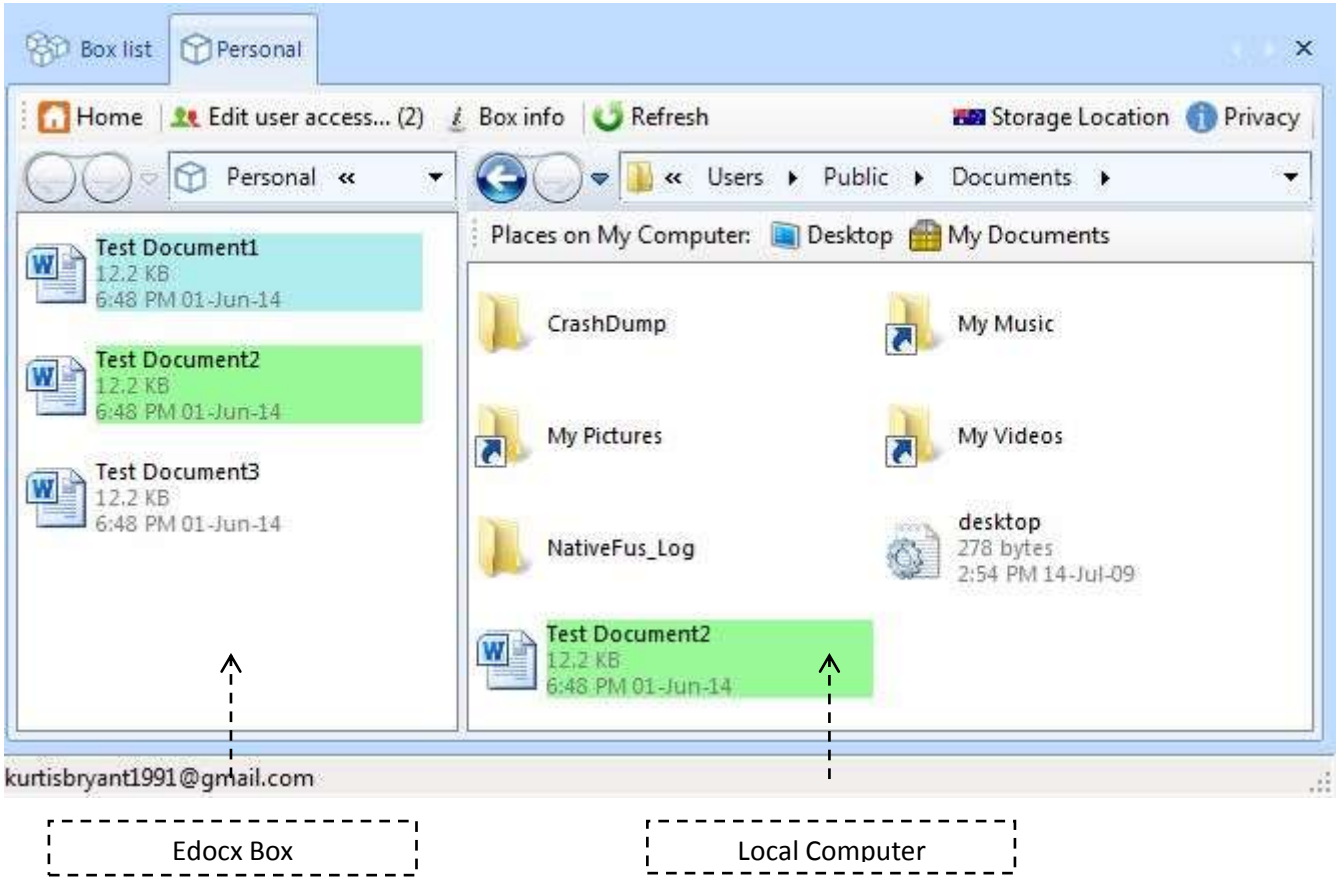


Note that you must have **Outlook 2010** or **Outlook 2007** installed to use this feature.

File Highlighting

For easy recognition of who is working on what, files can have three colours:

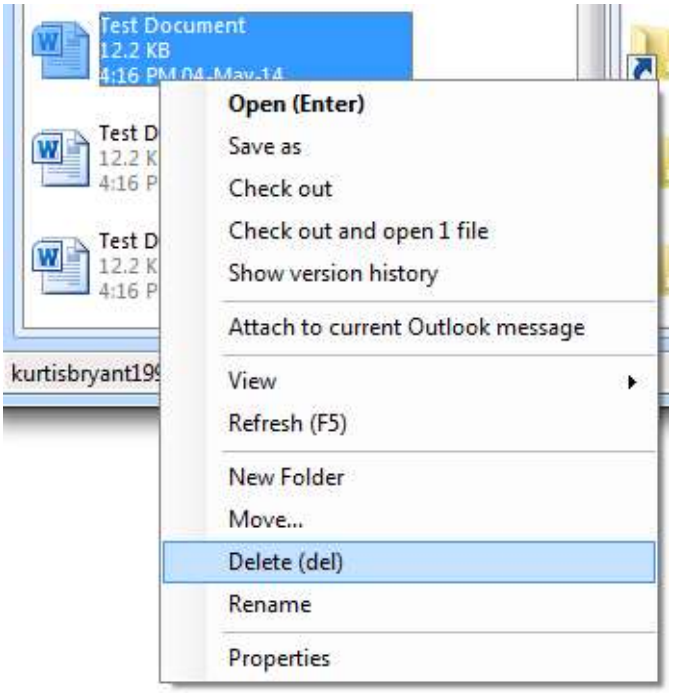
- No highlighting
  - The file is not checked out
- Green highlighting
  - The file is checked out by you on the computer that you are currently working on
- Blue highlighting
  - The file is checked out by another user, or by you on a computer that you are not currently working on
  - You cannot check in the file
  - The file cannot be checked out until the other person checks the file back in, or the checkout is cleared



If you have multiple **Users** that can access your Boxes, Edocx will not only list who has edited the file, but it will also tell you who it is currently **Checked out** by. Mouse over the **highlighted** file for more information.

Deleting a File

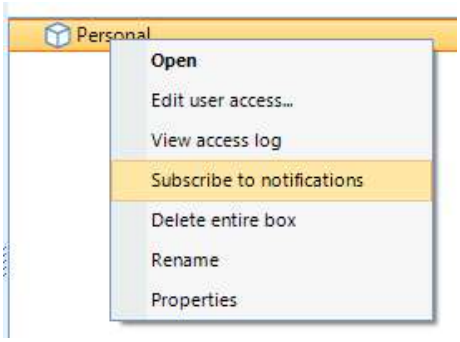
If you would like to delete a file on the **Edocx side**, right-click and select **Delete**. To delete a file on the **Local side**, right-click on the file and select **Delete**. Deleting a file on the **Edocx side**, the left, moves it to the **Trash folder**, while on the **Local side**, the file is moved to the **Recycle Bin**.



Features

Subscribe to notifications

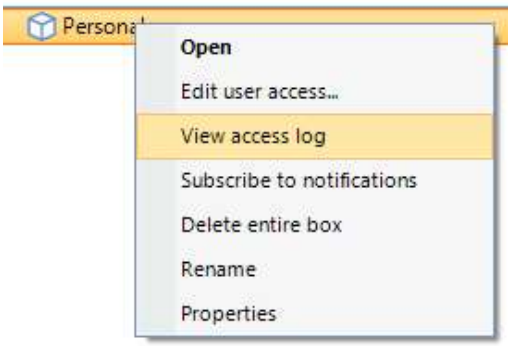
To be notified when a file is edited or uploaded in a box, you can right-click on a box, and select **Subscribe to notifications**.



You will receive an email from Edocx describing the changes made in the box.

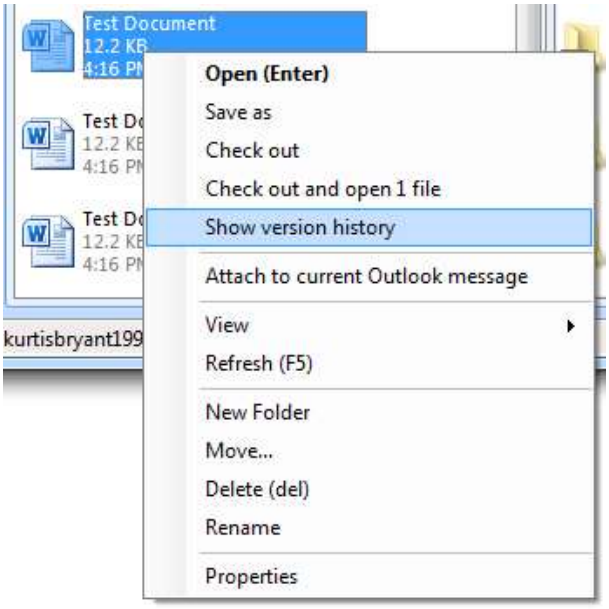
View access log

To see who and what has been happening to the files in a box, right-click and select **View access log**. This will bring up a window with information that shows what files at what time were edited, uploaded or modified. You are only able to do this if you are the owner of the box.



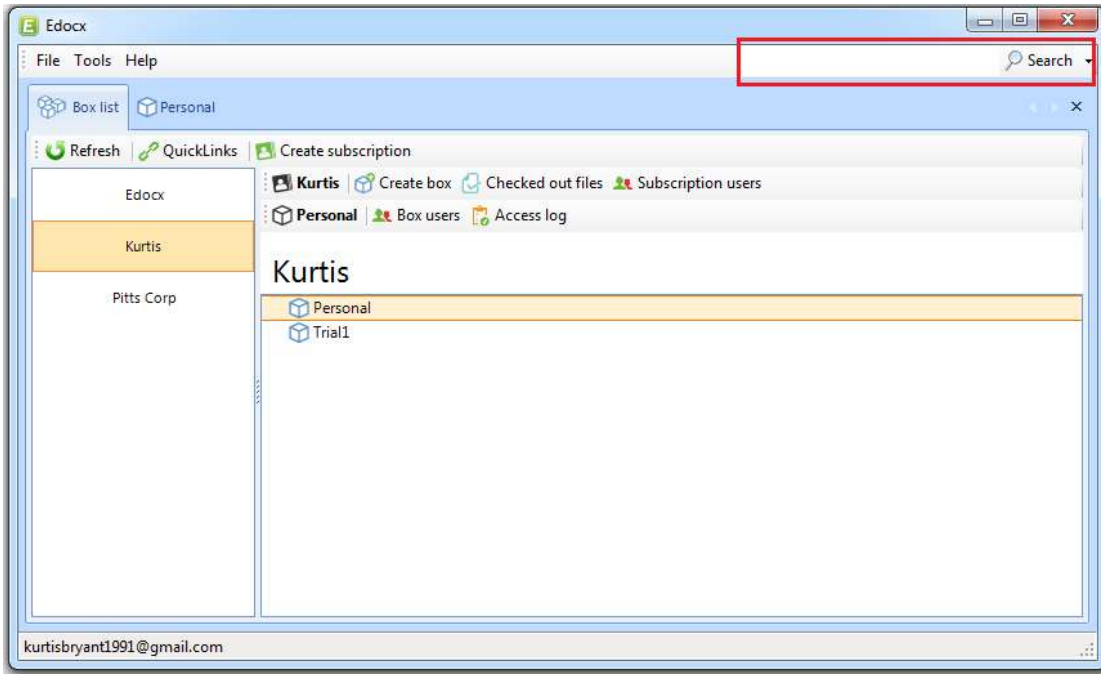
Version History

Edocx stores the version history for each specific file. To view the version history for a specific file, simply right-click on a file in Edocx and select **Show version history**. This will open a new window with the list of who has checked in the file, along with the **Users** who has updated the copy on Edocx.



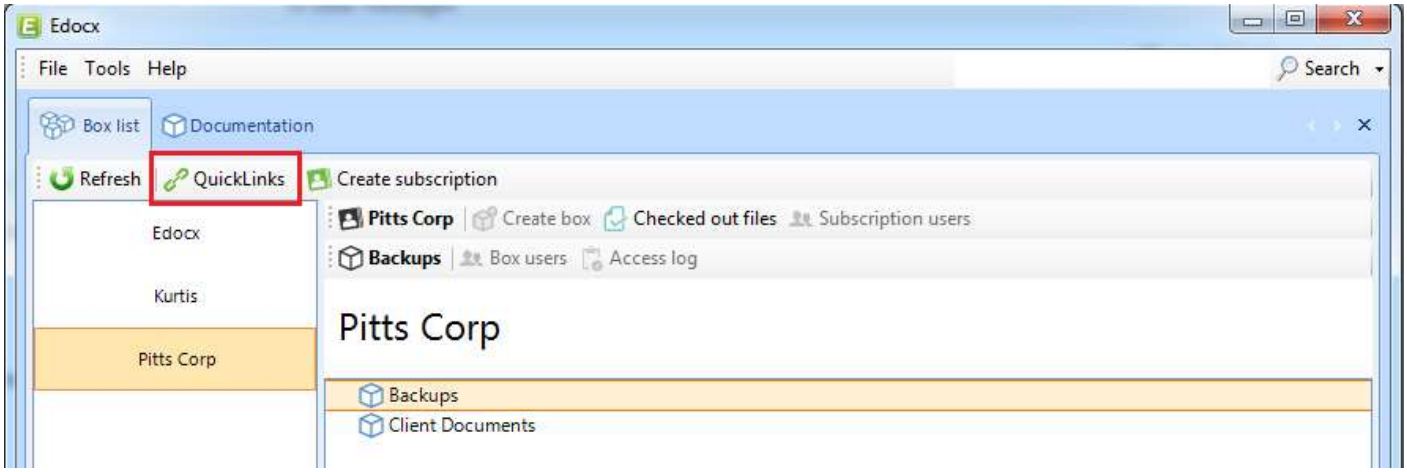
Searching for Files

To search for any files, simply click on the **Search** tab and type in any term to search. Keep in mind that Edocx searches only for file names, not contents of files. Once you have entered in the search term, you can double-click on the file you are looking for to open the location. You are only able to search for files that you have permission to view – if you are looking for a file that is in someone else's box, you will need to contact them to gain access rights.

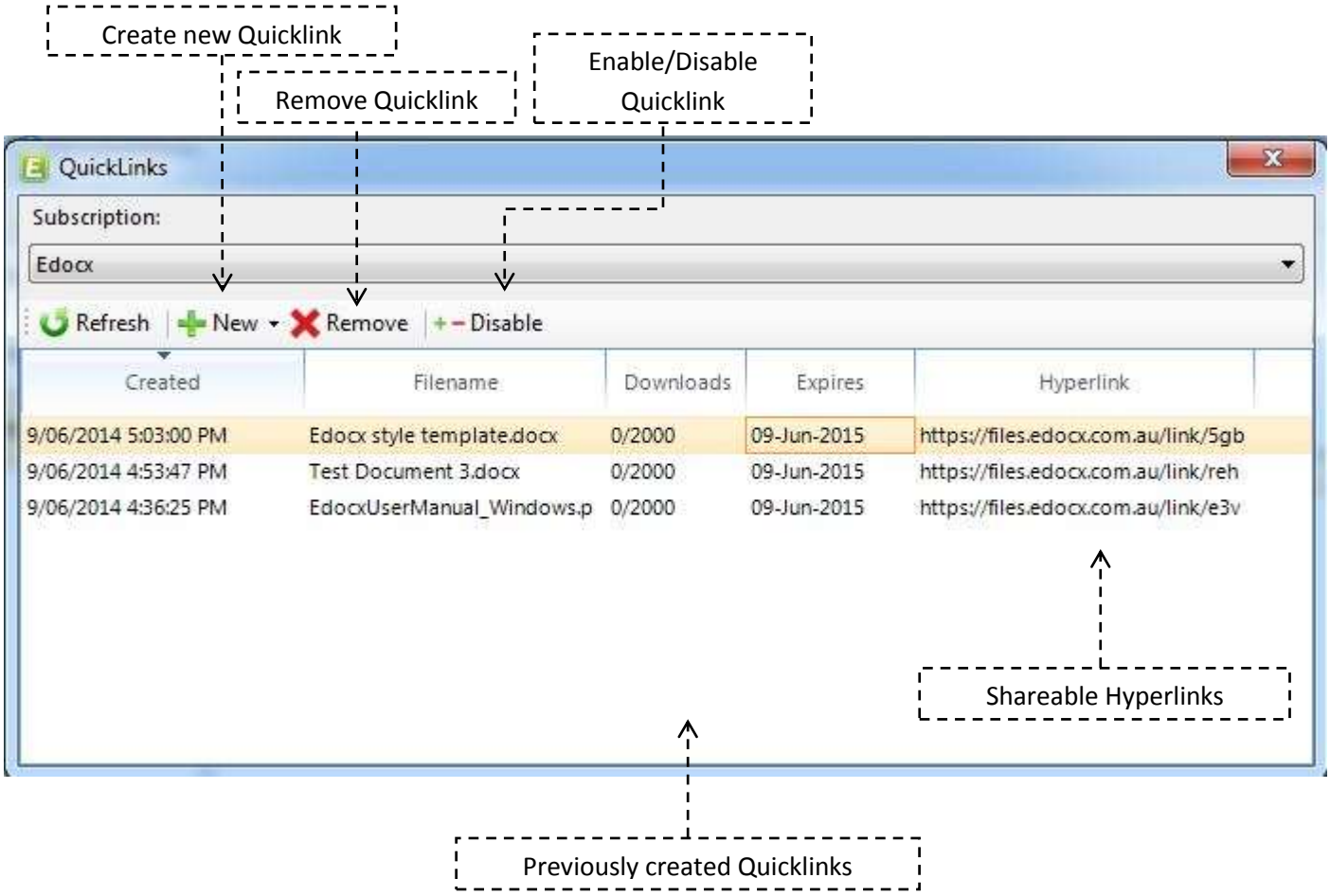


Quicklinks

When using Edocx, you will find that some files you access more than others. This is why we give you the feature to create a “Quicklink” of these files. Quicklinks also allows you to share your documents with other colleagues by sending them a Hyperlink. Quicklinks can be found in the “Box List” tab next to the “Refresh” option.

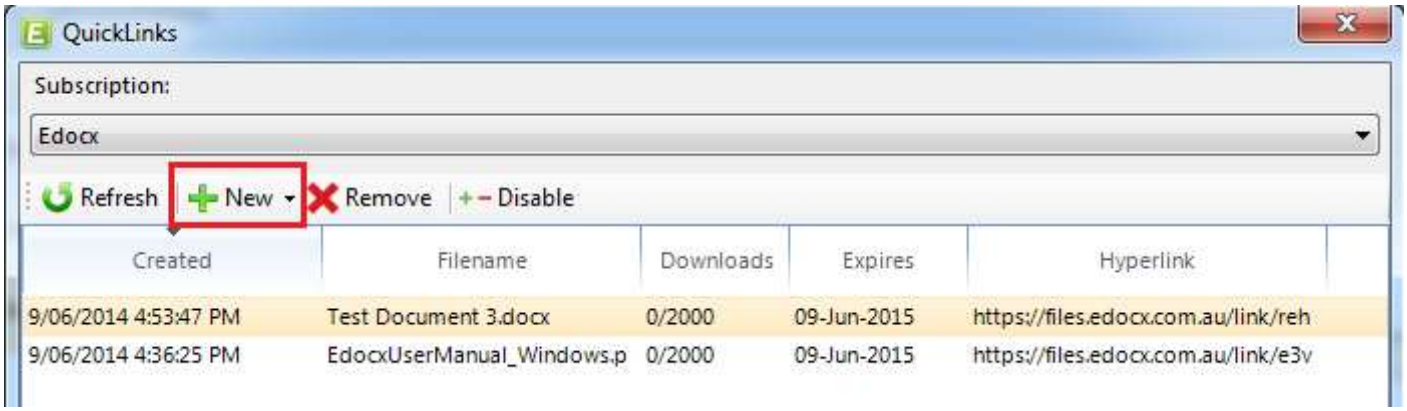


Manage your Quicklinks



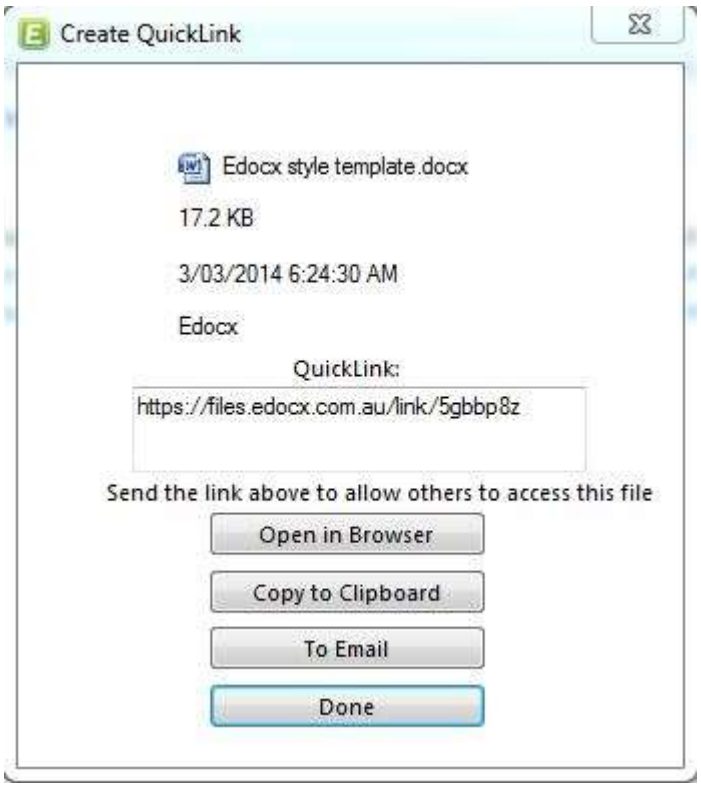
Creating a Quicklink

To create a Quicklink select the **New** tab in the Quicklink menu. This will give you the option to create a Quicklink for a file in Edocx or a file on your computer. When creating Quicklink you are given the option to provide a password for said Quicklink.



Sharing a Quicklink

While creating a Quicklink, users are given the options to “Open in Browser”, “Copy to Clipboard”, or “To Email”. To share Quicklinks with a colleague, users can either select the “To Email” option, or share the Quicklink Hyperlink.

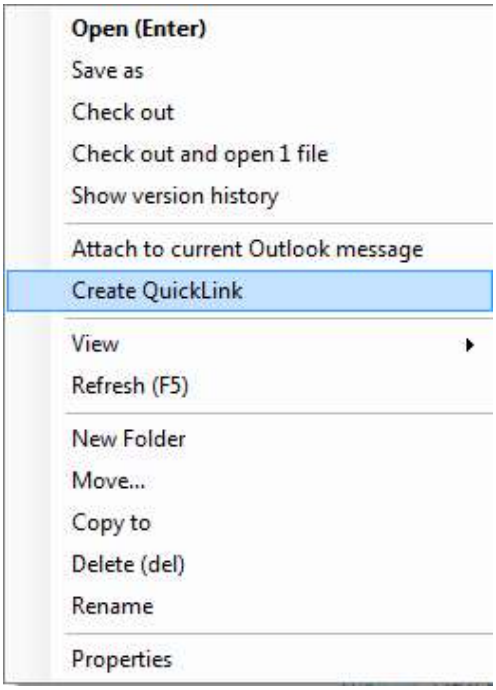


Removing and disabling Quicklinks

Edocx makes it simple to remove existing Quicklinks. Simply highlighting the Quicklink you no longer want and select **Remove**. This will not delete the file, but only render the shared Quicklinks unusable. If you do not want to remove the Quicklink but make the shared Quicklinks unusable, highlight the required Quicklink and select **Disable**. To reactivate Quicklinks, highlight the Quicklink and select **Enable.**

Make a QuickLink from a file existing in a box

For convenience when creating Quicklinks, we allow users create them when searching through files in their respective Boxes. This is done by right clicking on the file you would like to create a Quicklink for and selecting “Create Quicklink”. This can be done in both the Edocx Box and Local computer.



Users and Security

Remember that when you are setting up your boxes, each box is assigned to a set of users (**Users**). By having **Users** on your **User List**, you can set specific permissions for the files in each Box. Owners of boxes are able to assign **Read Only** or **Read/Write Access**. Every subscription to Edocx can have as many **Users** as they like.

You are able to assign which **Users** can view which boxes. So if you were a business owner, you could have a set up similar to this:

- A box for your personal documents and files (Personal) that only you have access to
- A box for company documents and dictations (called P.A.), that you and your P.A. have access to
- A box for quarterly reports and cashflows (called Financial Statements), accessible by the board members and the accountant

Adding a User

If you would like another "user" to view or edit files in a box, you can add them as a **User**. Go into the Box where you would like the new user, click on the **Users** tab next to the **Checked out files** tab, and select **Add**.

If they are signed up for Edocx, they will receive a notification in Edocx, regarding your invitation. However, if they do not have a subscription for Edocx, they will receive an introductory email welcoming them to Edocx, and have access to that Box at no cost to them.

Changing Permissions on a Box

To change the permissions on a box, look under **Editing access to a Box**. If you need to add a user to the **User list**, look under **Adding a User**.

Changing your Password

Go to https://edocx.com.au/recover to change your password and follow the prompts.

Password Recovery

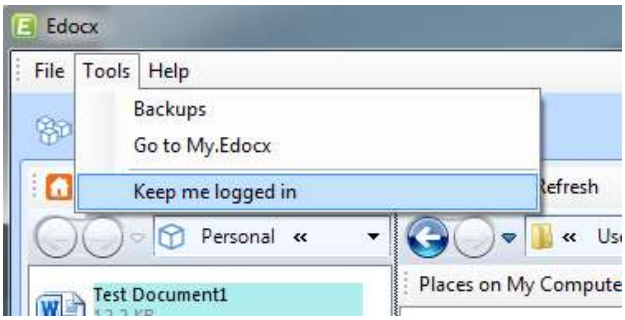
Go to https://edocx.com.au/recover to recover your password and follow the prompts.

Other Features and Settings

Additional features of Edocx are listed here.

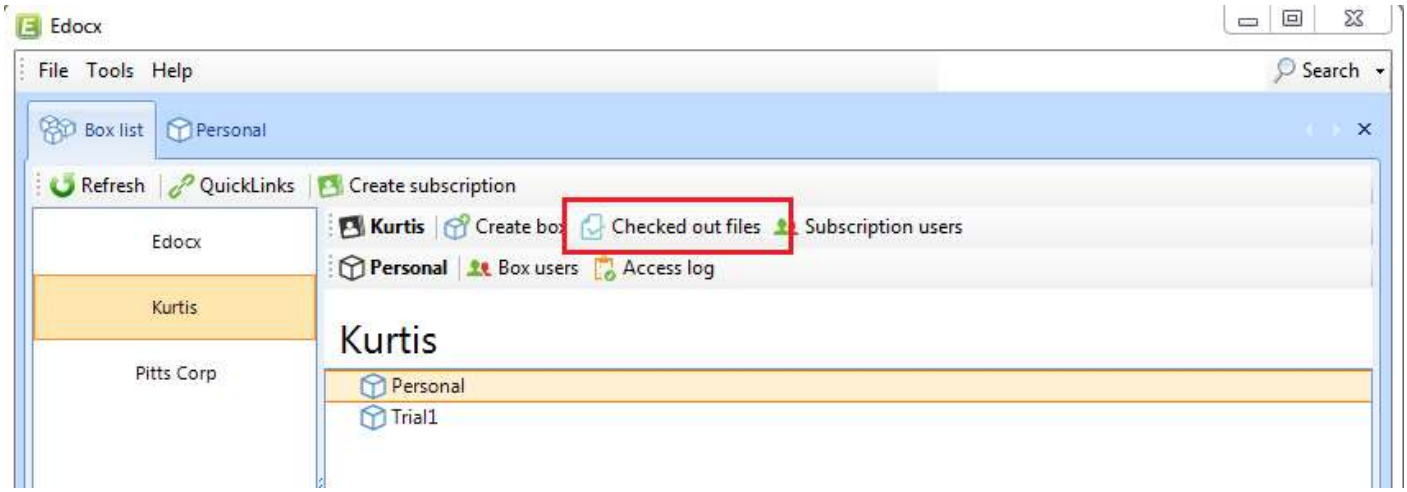
Saved Credentials

If you would like Edoxc to automatically log you in, you can have it save your log in credentials. To do this, click on the **Tools** tab and then select **Keep me logged in**. You will know when Edocx has saved your credentials, as the box next to **Keep me logged in** will be checked.

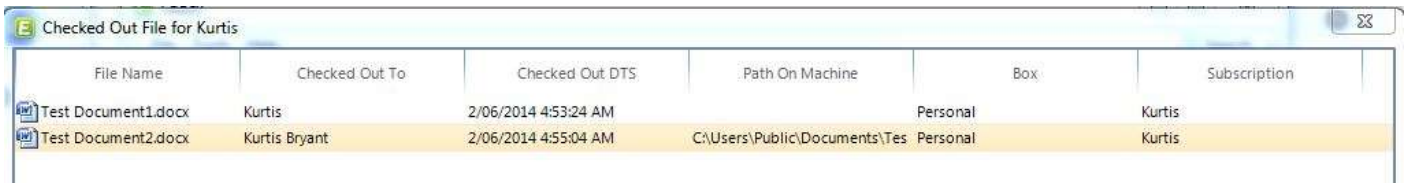


View Checked Out Files

To view files that have been check out, go to the **Box list** tab and select **Checked out files**.



This will give you a full list of files that have been checked out.



Finding the current version of Edocx

To find out what the current version of Edocx is, open Edocx and log in. After logging in, click on the **Help** dropdown menu and select **About Edocx**. This will then show you the current version and build of Edocx.
This manual is current as of the version listed on the front page.

Updating Edocx

Edocx has been engineered to update automatically – however it will need a connection to the internet to download the patch. Every time you login, Edocx will query the server to check your version against the current version, and will download and implement any files or data if need be.

* *If Edocx ever does need a manual update, we will provide instructions on how to implement the update.*

Settings

The below settings are located under **File** > **Settings…**

Changing the Default Start-up Directory

To change the default start-up directory – where the **Local Side** opens up to, open the **File** dropdown menu and then choose **Settings**. Now select the **Folders** tab on the **Edocx Settings** window. This will show the default for where the **Local Side** will open and save files to. To change this, click on the **Browse** button with the folder icon and browse to where you would like Edocx to open at when you login, or alternatively type in a directory of your own.

We suggest making a folder in your **My Documents** folder named **Edocx Checkouts**, and you set this as the default start-up directory, so that all the files that you **Check Out** are located in one folder, not spread across your hard drive.

Logging Out of Edocx

If you are finished with your Edocx session and you wish to log out of your account, click the **X** in the top right-hand corner of Edocx. This will bring you back to the **Login Screen**.
To log back in, either re-enter your credentials, or reopen Edocx at a later time.

Software not behaving properly

If you think you have found a situation where the software is not behaving as it should, please email helpdesk@edocx.com.au with a brief description. This will create a ticket in our helpdesk so we can follow up with you, and we will respond to you as soon as possible.
Please include how you believe you came across this confliction, what you were doing at the time, and when you did encounter it. All submissions will further the development of Edocx.

Have an idea for us?

Do you have a feature request, or an idea on how we could improve? Send us an email at helpdesk@edocx.com.au and we will submit it to our upcoming feature list.

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